New Client Form: We require a Copy of your 2024 Tax Return

Your Name		Spouse's Name	
SS#		SS#	
Date of Birth		Date of Birth	
Occupation		Occupation	

Home Address: School District: _____

City: State: Zip Code: County:

Do you live within the city limits of Kansas City? YES or NO Provide Dates if not a resident for all 12 months: _____

Did you move into or out of a state this year? YES or NO Provide Dates of move: _____

Communication Preference

Taxpayer Phone: _____ **Email:** _____

Spouse's Phone: _____ **Email:** _____

Preferred Contact:
- ☐ Taxpayer
- ☐ Spouse

Bank Information: New for 2025-The IRS is no longer issuing paper refund checks. All refunds must be made by Direct Deposit.

Name of Bank:		
☐ Checking Account ☐ Saving Account	Routing Number:	Account Number:

1.Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in digital asset such as cryptocurrency? **FORM 1099-DA YES NO**

2.Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country. Did the aggregate value of your foreign accounts exceed $10,000 at any time in 2025? **YES NO**

Check your Filing Status Below

☐ SINGLE	☐ MARRIED FILING JOINTLY	☐ MARRIED FILING SEPARATELY Date Separated:

- **Can you be claimed on your parent's tax return or on anyone else's this year? Yes No**

Completed Return Options

Select one of the following

Tax Return
- ☐ Send to my Portal
- ☐ Pickup at Benton Tax

Supporting Documents
- ☐ Send to my Portal and shred originals
- ☐ Pickup at Benton Tax

Claiming Dependents and Children

Dependent/Children *As Written on Social Security Card* (first, Middle, last name)	Social Security Number	Date of Birth	Relationship to You	Daycare Receipts	# of Months lived in your home in 2025
Any children that live in your Home that you will not be claiming in 2025?					

VERIFY THIS INFORMATION BY SIGNING HERE X_____

2025 TAX Questionnaire

General

YES	NO	
☐	☐	1.Did you receive an Identity protection pin (IP PIN) from the IRS? (A new PIN is required each year) ○ IP PIN _____
☐	☐	2.Did you have any debts canceled or forgiven in 2025? Such as a credit card. **FORM 1099-C**

2025 ESTIMATES

YES	NO	
☐	☐	3.Did you make any estimated payments towards your 2025 Taxes? Fill out table below
☐	☐	4.If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?

Federal		State	
Date:	Paid: $	Date:	Paid: $
Date:	Paid: $	Date:	Paid: $
Date:	Paid: $	Date:	Paid: $
Date:	Paid: $	Date:	Paid: $

DEPENDENTS

YES	NO	
☐	☐	5.Did your children attend Daycare? **Receipts are needed**, even if through payroll deduction. Receipts need to include name, address, and amount paid.
☐	☐	6.Did any children have unearned income (such as interest, dividends, capital gains) above $1350 for 2025?
☐	☐	7.Was your dependent between the age of 19-23 in 2025? *Were they a full time Student? _____ **OR** was their income amount under $5200? _____

EDUCATION

YES	NO	
☐	☐	8.Did you have any educational expenses on behalf of yourself, spouse, or a dependent? **FORM 1098-T**
☐	☐	9.Did anyone in your family receive a scholarship or grant of any kind? **College account transcript needed**
☐	☐	10.Did you make any withdrawals from an education savings or 529 plan? **Form 1099-Q**
☐	☐	11.Did you make any contributions to a 529 plan in 2025? **Provide end-of-year statement**
☐	☐	12.Did you pay student loan interest? **FORM 1098-E**
☐	☐	13.Are you a K-12 teacher, counselor, or principal and paid classroom expenses? **Total paid $_____**

NEW LAW

YES	NO	
☐	☐	14.Did you receive qualified tips reported on form W-2 or a statement provided by your employer? ○ **Provide 12/31 or last paystub of 2025**
☐	☐	15.Did you receive overtime pay reported on your W-2 or a statement provided by your employer? ○ **Provide 12/31 or last paystub of 2025**
☐	☐	16.Did you purchase a new passenger vehicle for personal use in 2025? Do the following questions apply to the vehicle? **VIN Number**: _____ ○ Was the final assembly completed in the U.S? YES NO ○ Is the gross Vehicle weight under 14,000 pounds? YES NO ○ The vehicle was not purchased with a lease? YES NO ○ Was interest paid on the loan secured for the vehicle? Interest amount $ _____
☐	☐	17.If you have a child born between 1/1/25-12/31/25, who may be eligible for the Federal *Trump Account* (a new tax advantage savings account seeded with $1,000) would you like to enroll them in the pilot program set to activate in July 2026? **FORM 4547**
☐	☐	18**.** Do you have any children not born in 2025 but under the age of 18 and would like to set up a Trump Account? (a tax advantage savings account- Does not qualify for $1000 seed investment)

ENERGY EFFICIENT

YES	NO	
☐	☐	19.Did you make any energy efficient improvement to your home in 2025? Such as windows, exterior doors, insulation, furnace, air conditioner, water heater, or central air system. ○ Must meet IRS efficiency standards to qualify. **Provide Receipts**_____
☐	☐	20. Did you install any clean energy property in 2025? Such as solar panels, solar water, geothermal heat pumps, wind turbines, fuel cells, or battery storage. **Provide Receipts**_____

HEALTH CARE

YES	NO	
☐	☐	21.Did any member of your household have healthcare coverage through the Marketplace? **FORM 1095-A**
☐	☐	22.Did you pay for medical insurance? (Not on W-2 or through social security) **Amount for year $** _____
☐	☐	23.Are you enrolled in a HSA (Health Savings Account)? **FORM 1099-SA**. Is this a self or family plan? (circle one)
☐	☐	Withdrawals? _____
		24.Did you pay any long-term care premiums for yourself or spouse? **Taxpayer $_____ spouse $_____**

ITEMIZED DEDUCTIONS

YES	NO	
☐	☐	25.Did you pay real estate property taxes or personal taxes during 2025? **Provide Receipts** (Paid in JAN 2026 will not apply for the 2025 tax year.)
☐	☐	26.Did you pay mortgage interest in 2025? **FORM 1098**
☐	☐	27.Did you make any cash donations to charity in 2025? **Provide receipts/ documentation**
☐	☐	28.Did you make any non-cash Donations to charity in 2025 such as clothes, furniture, ect.. **Provide receipts & Values**